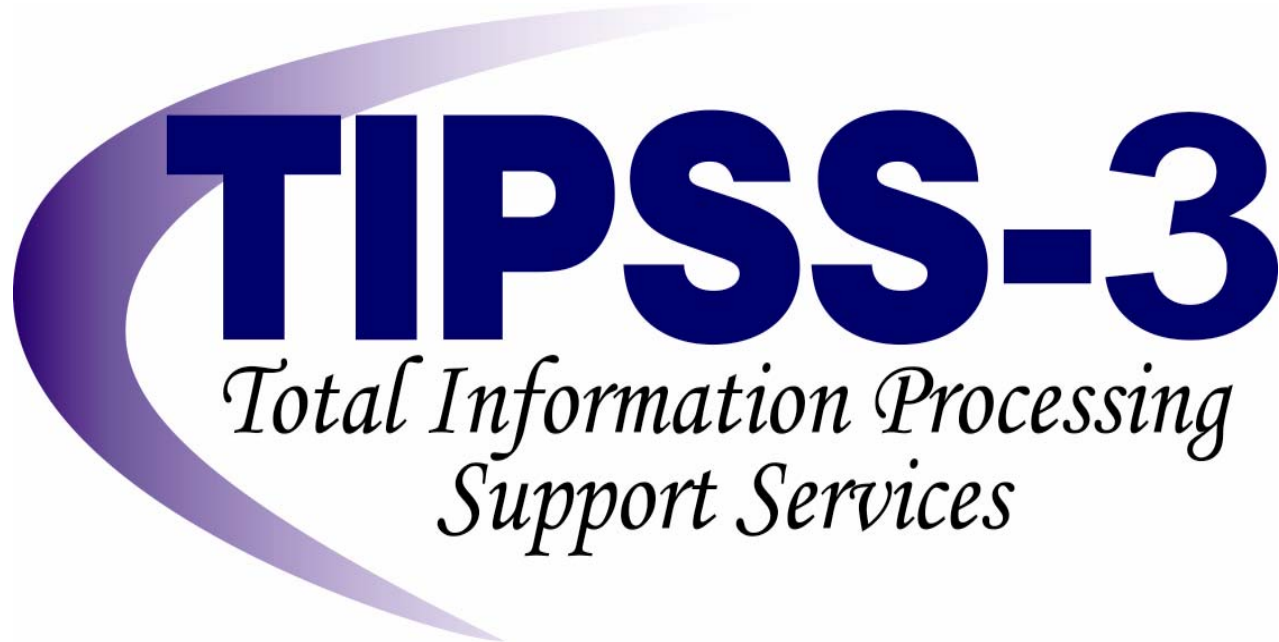
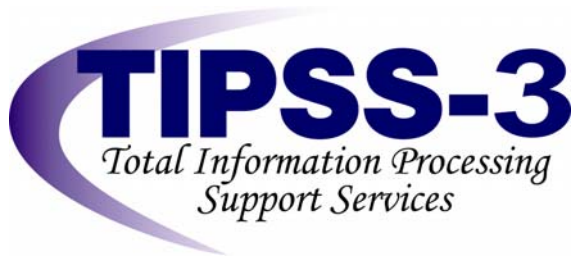


# SMALL BUSINESS NETWORKING CONFERENCE for



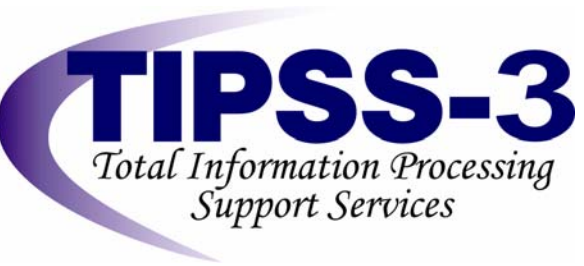
July 14, 2004



# **WELCOME**

## **OPENING REMARKS**

Ms. Jodie Paustian, IRS Small Business Advisor  
Mr. David Grant, Director, IRS Procurement



- Insert Small Business Slide

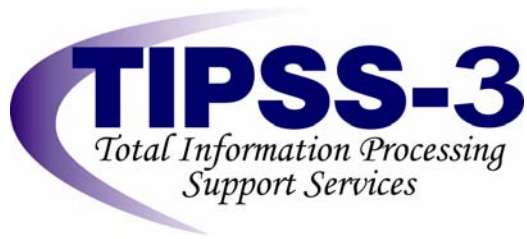


# CMMI OVERVIEW

Karen Parrish

Chief, Business Process Reengineering Section

202-283-6911



# TIPSS PROGRAM OVERVIEW

James Barber, Chief, Tax Systems Administration  
Sara Schroerlucke, Chief, TIPSS Branch  
Ethel Carter, TIPSS-3 Project Manager

# Comparison Chart

## **TIPSS-2**

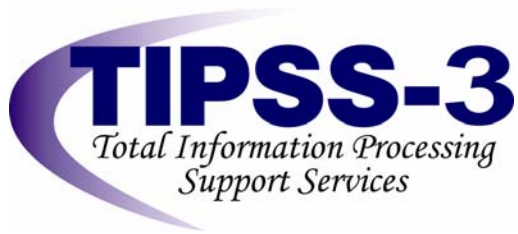
- **18 Prime Contracts**
- **5 Small Businesses**
- **Over \$1.9 Billion Obligated**
- **4 Task Areas**
  - **Information Systems Services**
  - **Telecommunications Services**
  - **Organizational/Management Services**
  - **Operations Support Services**
- **F & O Competition – All 4 Task Areas**
- **Partial Small Business Set-Aside (All Task Areas)**
- **Combination Hard Copy + Oral Presentation**

## **TIPSS-3**

- **8 – 12 Prime Contracts**
- **4 – 6 Small Business Set-Aside**
- **\$3 Billion Estimated – 5 Year Term**
- **3 Task Areas**
  - **Information Systems Services**
  - **System Security Services**
  - **Strategic Business Services**
- **F & O Competition – All 3 Task Areas**
- **Partial Small Business Set-Aside (All Task Areas)**
- **Combination Hard Copy + Oral Presentation**

# VALUE ADDED BENEFITS

- Multiple Agency Contract (MAC)
- Increased Small Business Participation
- Increased Emphasis on Teaming Arrangements
- Emphasis on PBSC and FFP
- Potential Expanded use of the Internet/Intranet



# CONTRACT OVERVIEW

Ms. Ethel Carter  
TIPSS-3 Project Manager  
202.283.1354



## **OVERVIEW**

- 8-12 Prime Contractors of which 4-6 Small Business Contracts will be awarded
- \$3B Estimated – 5 Year Term
- TIPSS-3 Contracts will provide services for Department of Treasury, Treasury Bureaus, Internal Revenue Service, Departments of Homeland Security and Justice

## **OVERVIEW (CON'T)**

- 3 Task Areas
  - Information Systems Services
  - System Security Services
  - Strategic Business Services
- Multiple Agency Contract (MAC)
- Contract Type – IDIQ (CPFF, FP, T&M)

# MLESTONES

- Release RFP:        June 2004
- Award Contract:    June 2005
- Begin Ordering:    July 2005
- Points of Contact:
  - Ethel M. Carter, Project Manager, 202.283.1354
  - Robert Niedzwiecki, Contracting Officer,  
202.283.1141

## Types of Competition

- Full and Open Competition
  - Partial 8(a) Competitive, HUBZone Set-Aside, Service-Disabled Veteran-Owned Set-Aside, and Small Business Set-Aside
  - Task Orders will feature term, completion, and performance-based type work

## OVERVIEW (CON'T)

- Small Business Set-Aside
  - Set-aside all task orders \$250,000 or less
  - No set-aside for sole source acquisitions
  - Estimated that 35% of all task orders will be Small Business Set-Aside

## OVERVIEW (CON'T)

- Small Business Set-Aside Offerors may submit a proposal for ***both the full and open and small business set-aside competitions.***
- Large and small business Offerors who elect to compete under full and open competition ***must*** submit a proposal in the ISS Task Area.
- For full and open competition, those Offerors who ***do not submit in the ISS Task Area will be determined to be non-responsive.***

# CONTRACT OVERVIEW

- The Offerors' must submit a separate technical/cost proposal for each task area
- Teaming Arrangements - Large and small – small and large - small and small – large and large on a case-by-case basis
- *No restriction* on subcontracts – primes are held totally accountable for all subcontractors

# CONTRACT SECTIONS

- Section C
  - After award, successful contractors are required to provide funds to the IRS for background investigations.
- Section H
  - Any supplies and services furnished under this contract shall be ordered by issuance of task orders. Funds will be obligated per task order.
  - Contractor or subcontractors may be required as part of performance to work with other contractors (firms working with the IRS under other contracts).



# CONTRACT SECTIONS

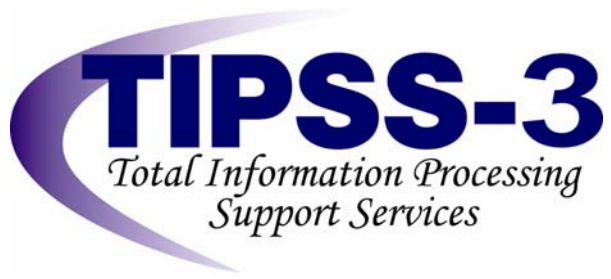
- Section L
  - Submission of Proposal
    - Cover Letter
    - Original and 4 hard copies and 2 electronic copies per volume
    - 3 separate volumes
      - Volume I - Terms and Conditions
      - Volume II - Technical Proposal
      - Volume III - Cost/Price and Financial Data Proposal

# CONTRACT SECTIONS

- Volume I – Terms and Conditions
  - Signed SF 33, Responsible official of Company
  - Representations, Certifications and Agreement with Terms and Conditions – Section K fully executed
  - Pre-Award CMMI-SW Validation – Large and Small Business under F&O Competition shall provide a letter of intent to be compliant by November 29, 2004.
  - Past Performance
  - Mentor Protégé
  - Quarterly Reports

# CONTRACT SECTIONS

- SBSA Offerors may validate their SEI CMMI-SW Level 2 status by providing same as full and open competition, **or** deferring validation until after contract award.
- Subcontracting Plan completed by Large Business Offerors and submission of SF 295 forms.



# TECHNICAL OVERVIEW

Cathy Williamson  
TIPSS-3 Technical Lead  
202.283.6861

# Evaluation Strategy

- Stage 1 – Evaluation and Verification of Offerors' Eligibility
  - \* Business Aspects
  - \* CMMI Letter of Understanding
- Stage 2 – Technical Evaluation of Written Responses
  - \* Project Profiles/Past Performance
  - \* Management Approach
  - \* Resumes
- Stage 3 – Competitive Range
  - \* Oral Presentation (only for those in competitive range)
  - \* CMMI Validation

## **Information System Services (ISS) –**

Description: Includes all aspects of software, security, training, and quality assurance support services.

Examples (not all inclusive):

- Systems/Database Design, Development, Implementation, Customization
- Requirements Analysis Support
- Web-Site Development and Support
- Optimization Support
- Operations Management Support
- Telecommunications

### **SYSTEM SECURITY SERVICES (SSS) –**

Description: Includes all aspects of systems security services.

Examples (not all inclusive):

- Computer Security Awareness and Training
- Computer Security Incident Response
- Computer Security Planning
- Crypto Systems
- Digital Signatures
- Disaster Recovery, Continuity of Operations, and Contingency Planning
- Public Key Infrastructure (PKI)
- Security Certification and Accreditation

# **TIPSS-3 TASK AREAS**

## **(CONTINUED)**

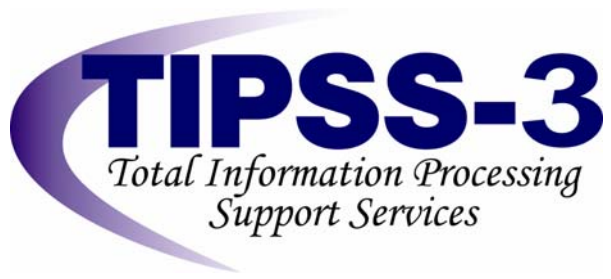
### **STRATEGIC BUSINESS SERVICES (SBS) –**

Description: Includes all aspects of strategic business services.

Examples (not all inclusive):

- Work System Design and Implementation;
- Independent Validation and Verification Support;
- Technical Support for the Disabled (Customization of Automated Interfaces, Needs Assessments, and etc.);
- Configuration Management Support, Including Planning and Reviews
- Business Process Re-engineering

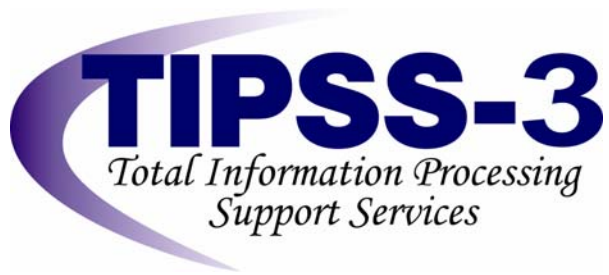




# Volume II

## Technical Proposal

- Project Profiles/Past Performance
- Management Approach
- Resumes



# PROJECT PROFILES/ PAST PERFORMANCE

- Unique to each proposed task area
- Current: within last 3 years
- Government or Commercial support
- Work performed in multiple geographical locations
- 10 page limit per profile
- Offeror's experience: 1 or more profiles
  - Subcontractor's experience: at least 1 profile
  - Full and Open: 5 profiles required
  - Small Business Set-Aside: 3 profiles required
- Past Performance References

# MANAGEMENT APPROACH

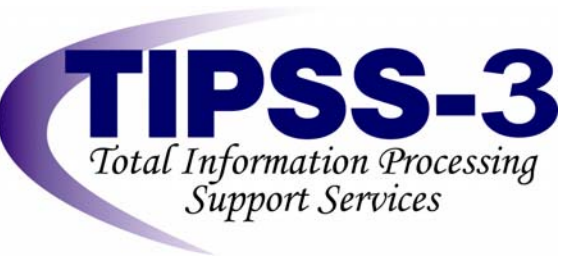
- Inclusive of all task areas
- Describe how you will organize, staff, and manage the project
- Not to exceed 15 pages
- Evaluation Factors
  - Program/Project Management
  - Recruitment and Retention
  - Staffing
  - Cost/Schedule Control
  - Organizational Structure
  - Subcontractor Management

# RESUMES

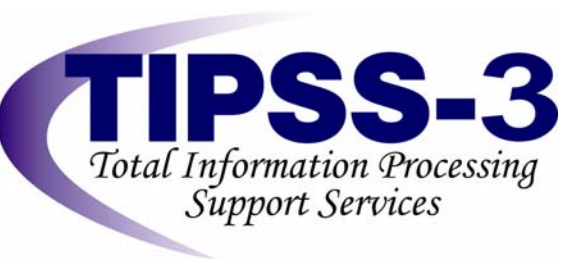
- TIPSS-3 Project Key Personnel
  - Full and Open
    - 4 Resumes; no more than 2 pages each
    - 4 Back-up resumes; no more than 2 pages each
  - Small Business Set-Aside
    - 4 Resumes; no more than 2 pages each
    - No back-up resumes required

# ORAL PRESENTATIONS

- All Offerors within the competitive range will be notified at least one week in advance of the date, place, and time of the oral presentation.
- Amendment to the RFP will be posted to reflect email notification versus an amendment with instructions.
- Successful Offerors will be sent an email with instructions three (3) business days prior to scheduled presentation.



# COST PROPOSAL OVERVIEW



# CLOSING REMARKS & COLLECTION OF QUESTION CARDS